

PRESENTERS:
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HYP2: Manage Position and Employee Data

Presented by SDCOE CRC | January 29, 2018



SAN DIEGO COUNTY
OFFICE OF EDUCATION

CUSTOMER RESOURCE CENTER

Agenda

MORNING

9:30-12:30

- Review HYP1 takeaways, discuss 3 methods of manipulating data in Hyperion
- TOGETHER: Part VII of guide - Add a Position (Production environment with your Sandbox data)
- TOGETHER: Part VIII of guide - Maintain Employee By Position (update/edit existing data for employees in Production with your Sandbox data)

LUNCH

12:30-1:30

- 60-minute lunch break

AFTERNOON

1:30-4:00

- TOGETHER: Continue Part VIII
- ON YOUR OWN: Complete 2 common tasks
- Employee History Report – VIDEO (7 min)
- Run Business Rules and other tasks
- ON YOUR OWN: Time to practice, if desired
- Discussion, recap, evaluation, dismissal



Hyperion Training & Support

	M 1/22/18	M 1/29/18	M 2/5/18
AM 9:30 am - 12:30 pm	HYP1: Introduction to Hyperion (ALL DAY) <ul style="list-style-type: none"> Part I: Overview Part II: Getting Started View activities using training database 	HYP2: Manage Position and Employee Data (ALL DAY) <ul style="list-style-type: none"> Part VII: Maintain Position Data Part VIII: Maintain Employee By Position 	HYP3: Smart View 9:30 am -12:00 pm <ul style="list-style-type: none"> Part IX: Smart View (Excel Add-On)
PM 1:30-4:00 pm	<ul style="list-style-type: none"> View activities using training database (continued) View your own data Part III: Administrator & Coordinator Tasks Part IV: Updating and Working with HCP Data Handout to discuss HCM auditing prior to pulling extracts <p>Not covered in training: Part VI: Manage Budget Line Items (Non-Salary) – Review on your own as needed</p>	<ul style="list-style-type: none"> Part VIII: Maintain Employee By Position (continued) 	HYP4: HCM Extracts and Auditing Loaded Data 1:00-4:00 pm <ul style="list-style-type: none"> Part V: Working With Extracts (Excel) – Heavy Excel emphasis (Filters, text-to columns, vlookups, etc.)

- For Part X Audit Data Adopt Budget and Export to PeopleSoft Finance – watch videos when you are ready.
- 1:1 work sessions can be scheduled at SDCOE after February 5th through March 2018.
- To schedule a 1:1 work session, please contact Lori Free-Trout (lfreetrout@sdcoe.net). Provide 2-week lead time.



Recap HYP1

- Take-Aways
 - Software introduction
 - Big picture how HCM, Finance, and Hyperion tie together
 - User and district variables and preferences
 - Audit HCM position data before requesting extracts
 - Appendix A
 - Navigate and view data
 - Rules of Thumb – IE and PC
 - Terminology
 - Cycle of Budget Process
 - Audit Data, Request extracts, Add/Change data, Run business rules, Export to Excel import template
- Evaluation
 - Skipping around the guide
 - Needed a better introduction/background on Hyperion
 - Fast-paced at times



Recap HYP1

- Why Hyperion?
 - All data in one place
 - Accuracy of calculations
 - Comprehensive approach to forecasting salary budgets
 - Ability for multi-year data comparisons
 - County support by the CRC and MITI for all aspects – PeopleSoft HCM, Finance and Hyperion
 - Hyperion vs. Excel:
 - An equivalent output would take many spreadsheets and tabs
 - Many opportunities for error in formulas
 - Multi-years/comparisons would be much more difficultCreates an archive of previous budgets
- It Gets Easier:
 - Year 2 & 3 Districts report it's much easier after the first year
- Questions
 - Anything you'd like to ask before we continue?



Objectives

BY THE END OF THE SESSION, YOU WILL BE ABLE TO:

- Complete common tasks from My Task List:
 - **Maintain Position Data (p.104)**
 1. Add a Position
 2. Assign a To-Be-Hired Employee

 - **Maintain Employee By Position (p.112)**
 1. Add Employee Details
 2. Change the funding source
 3. Split-fund a position
 4. Add an additional earning (MCOP or Additional Pay)
 5. Change Benefits
 6. Change annual salary



HYPERION BIG PICTURE

How PeopleSoft HCM, Finance, and Hyperion Fit Together

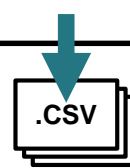
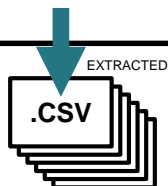
PeopleSoft HCM

- Contains HR data
 - Departments
 - Positions
 - Employees
 - Salary
 - MCOP
- Contains Benefits & Payroll data

PeopleSoft Finance

- Contains Finance data
 - General Ledger
 - Budget
 - ChartFields and ChartStrings

- Verify data accuracy
- Submit ticket to request extracts
- MITI creates and loads extracts
- Review your extracts and Hyperion



HCM Extracts (10)

- 01 - EMPLOYEES
- 02 - POSITIONDATA
- 03 - BudgetEMPLINFO
- 04 - BudgetPOSITIONINFO
- 05 - BudgetEMPLPOSINFO
- 06 - BudgetEMPLFTEINFO
- 07 - BudgetPOSFTEINFO
- 08 - BudgetEMPSALGRINFO
- 10 - BudgetEMPCOMPINFO
- 14 - BudgetEMPALLOCINFO

EDIT DATA IN EXCEL (SMART VIEW)



Hyperion

- Contains data from extracts (HCM, Finance)
- Complete your budget planning in Hyperion (budget-related items only)
 - Manage Budget Line Items (Non-Salary)
 - Maintain Position Data
 - Maintain Employee By Position
- Audit data, export to Finance

HCP = Human Capital Planning
Plan 1 = Finance

Finance Extracts (8)

- 2018_Hyperion
This Finance extract contains Actuals, KK_EXP_BUD, KK_REV_BUD. Note that Actuals are not loaded into Hyperion.
- FUND
- RESOURCE
- GOAL
- FUNCTION
- OBJ
- ENT (Site)
- OPERUNIT

EXPORT TO FINANCE



Three Methods of Manipulating Data

	Method	Use
1	My Task List <i>"Delivered forms"</i>	<ul style="list-style-type: none">• Best for seeing the overall status of the sites and incumbent/position detail• Best for quick changes• Best for updating an employee• Most common tasks can be accomplished using My Task List
2	Forms <i>"Custom forms" that begin with M_</i>	<ul style="list-style-type: none">• Forms are mostly used in conjunction with Smart View when manipulating data, however you can edit/update information from M_ forms
3	Smart View <i>This is an Excel add-in that interfaces with Hyperion</i>	<ul style="list-style-type: none">• Best for changes to many employees• Use Smart View when you want to take advantage of Excel features (sort, filter, etc.)



Incumbent Line vs Vacancy Line

REMINDER:
Hyperion is
employee-driven,
not position-
driven

- All of the detail information should be **on the Incumbent line**, not the Vacancy line
- Right-click Employee Name, Edit Employee Details
- Vacancy line will only have FTE
- For vacancies, assign a To Be Hired employee and budget on the Incumbent line (not the Vacancy line)



Maintain Position Data

Please turn to p.104 of your guide.

Together we will:

1. Log into Hyperion Training (Internet Explorer)
2. Review the Maintain Position Data
3. Complete the 2 common tasks

A diamond (◆) indicates a common task.



Pseudo Data Request Template

- Pseudo positions can be set up for Substitutes, Extra Help, and Overtime
- If your district wants to set up pseudo positions, download and complete the [Pseudo Data Request Template Information v1.0.xlsx](#), then attach it to a new HEAT ticket.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W
1	POSITION				EMPLOYEE		FTE	ALLOCATION (Total allocation for positions/employees should be 100%)								SALARY (provide annual salary rate for Override Option)		OTHER COMPENSATION (Provide monthly rate for each type)					
2	POV Site	Parities	Position Descript	Cert/Class	Employee	Employee Num	(Provide Parities FTE)	Fund	Resource	Goal	Section	Object	Site	OperUnit	PT	Percentage Allocated		WCP	Medical	Dental	Vision	Life Insurance	
3	Example	S001	S_999999	Substitute Teach	Certificated	SEM_9999	JCOS Metro	1	F0100	R0000999	G10	U1000	A_1100999	5222	L_Blank	PT_Blank	100	100,000.00	2.37	525	45	10	4
4																							
5																							
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14																							

- This is not a load file. This file is used to gather information.
- RECOMMENDATION: All Pseudo Positions should be added to same POV site. This aids in locating the positions later.



Maintain Employees by Position

Please turn to p.116 of your guide.

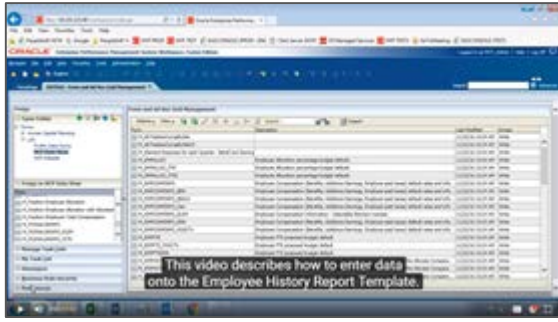
Together we will:

1. Log into Hyperion Training (Internet Explorer)
2. Review the Maintain Employees by Position form (GETTING STARTED)
3. Complete 6 common tasks

A diamond (◆) indicates a common task.



Employee History Report



Video Tutorial

[How to Enter Data Onto the Employee History Report Template](#)

7 min, 22 sec

This video shows you how to generate an Employee History Report. Video is posted at

<http://crc.sdcoe.net/resources/peoplesoft/tutorials>.

Directions are at:

<http://crc.sdcoe.net/announcements/peoplesoftnews/hyperionemployeereport>

Summary of steps:

1. Download **Employee History Report Template 10000 Lines - UNPROTECTED v1.0.xlsx** from the CRC Guides & Job Aids page. *The 5000-line restriction is now gone.*
2. In Hyperion go to **Forms > LEA > HCP Data View > M_Position Employee Allocation**.
 - a. Export the form to Excel by going to **Tools > Export as Spreadsheet**.
 - b. Copy the data and Paste Values into the **Position Employee Allocation tab** on the Employee History Report Template.
3. Go to **Forms > LEA > HCP Data View > M_Position Employee Total Compensation**.
 - a. Export the form to Excel by going to **Tools > Export as Spreadsheet**.
 - b. Copy the data and paste values into the **Position Employee total Compensation tab** on the Employee History Report Template.
4. See the calculated totals on the **Allocation_Total Compensation tab**.



Employee History Report

On the Allocation_Total Compensation tab, you can use various tools to view the data:

- Sort by Fund, Resource, etc.
- See only Vacancies
- Remove Vacancies
- Use conditional formatting to see duplicate values
- Copy the Allocation_Total Compensation information to a new tab to do a pivot table.
- Compare the Position Employee Total Compensation to the Total Compensation by using a vlookup to see values that differ.



Other Tasks

- **Manage Other Compensation Elements (p.43)**
 - Forms menu, default values
 - My Task List, add options
- **Run Business Rules (p.44)**
- **Add a Member to an Existing Smart List (p.72)**



Time to Practice!

Directions: ON YOUR OWN – Repeat desired common tasks in your Production environment (loaded with Sandbox data).

To Try:

- **Maintain Position Data**

1. Add a Position (p.105)
2. Assign a To-Be-Hired Employee (p.107)

- **Maintain Employee By Position**

1. Add Employee Details (p.116)
2. Change the Funding Source (p.125)
3. Split-fund a position (p.126)
4. Add Additional Earnings (p.128)
5. Change Benefits (p.129)
6. Change Annual Salary (p.131)



Summary of Links

- **Sites:**
 - PeopleSoft Portal to access Hyperion: <https://peoplesoft.erp.sdcoe.net>
 - HEAT Self-Service: <http://hss.sdcoe.net>
 - Secure File Transfer System (SFTS): <http://bssftp.sdcoe.net>
- **Guides & Job Aids page for guide, forms, templates are at <http://crc.sdcoe.net/resources/peoplesoft/guides>**
 - Newest Hyperion Guide will be published 12/11/17
 - [Hyperion Extracts Request Form v3.0.pdf](#) (Form – download for “fillable” fields)
 - [HCM Extracts versus Hyperion Audit Guidelines v1.0](#) (Job Aid)
 - [Employee History Report Template 10000 Lines - UNPROTECTED v1.0.xlsx](#) (Excel Template)
 - [Pseudo Data Request Template Information v1.0.xlsx](#) (Excel Template)
 - [Hyperion Role Assignment Request Form v1.0.xlsx](#) (Excel form)
- **Hyperion videos are at <http://crc.sdcoe.net/resources/peoplesoft/tutorials>**
 - [How to Use Sandbox Data](#) (5:41)
 - [How to Enter Data Onto the Employee History Report Template](#) (7:22)
 - Additional video tutorials will be posted in Spring 2018
- **Hyperion announcements are at <http://crc.sdcoe.net/announcements/hyperionnews>**
 - “HCM auditing prior to pulling extracts” announcement:
<http://crc.sdcoe.net/announcements/hyperionnews/hcmauditingpriortopullingextracts>
 - Employee History Report announcement:
<http://crc.sdcoe.net/announcements/peoplesoftnews/hyperionemployeehistoryreport>



Q & A

Before we go to the course evaluation, what kinds of questions can we answer?

COURSE EVALUATION

Please go to the Links page on the CRC website. Scroll all the way to the bottom and click on Peri the Muppet.

